



BCRPA MEMBERSHIP DATABASE REQUEST FOR PROPOSALS

Background Description

The British Columbia Recreation and Parks Association (BCRPA) is a not-for-profit organization dedicated to building and sustaining active, healthy lifestyles and communities. For more than 50 years, the Association has been a central resource for its members, providing leadership, training and support. BCRPA's diverse network includes parks, recreation and culture professionals; volunteers; students; fitness professionals; local governments; business interests; and other community partners. Working together, BCRPA's members support healthy individuals and communities, and sustainable environments and economies. Together, we are creating a high quality of life for everyone in BC.

Project Description

In order to support BCRPA's plans for service improvement, cost reduction and growth, the organization needs to consolidate existing data sources into one contact-driven database accessible through different user levels on the internet.

The aim is to improve and further build upon our relationship with stakeholders, create a joined-up approach across the organization and to give stakeholders the responsibility to manage their relationship with BCRPA online.

Project Deliverables

The work should be undertaken in a phased approach with the following objectives under each stage:

Phase 1

Analyze and clean up existing data based upon existing and future business needs

Phase 2

Design, build, test, and implement the software to meet the needs of the organization or customize an off-the-shelf product that would suit the following requirements:

- Consolidate data into one contact-driven database which will include the following components:
- Contact Relationship Management (CRM) system
- Content Management System (CMS)
- Project/task management system
- Dedicated areas for specific project areas such as Fitness Registrations, Membership, Events, Parks & Recreation
- Various modules such as Grants, Job Board, Hyperlink management
- Automated management of events, training, workshops and conferences
- Point of Sale system
- Reports including statistics and financial data
- Security features

Rollout of the system should also include:

- Testing, evaluation, parallel running
- User Training (Administrator and Staff level)
- Documentation

Regardless of which method is utilized the following conditions should be considered:

- The front end of the program would be available to staff and stakeholders through a permission-based website using the organization's branded template within the Content Management System
- Functionality should be database-driven modules in order to automate processes as much as possible
- The system might need to be connected to a Document Management System to allow users to search our library of information

Support

A separate contract for the ongoing support, maintenance and upgrade of the system may be negotiated with the consultant.

Websites

BCRPA has two websites which need to be integrated into this Content Management System:

- BCRPA Main Website
<http://www.bcrpa.bc.ca>
Website using Contribute to author pages
- Active Communities
<http://www.activecommunities.bc.ca>
Using WordPress CMS plugin

Make recommendations for the possible integration of the following websites:

- Physical Activity Strategy
<http://www.physicalactivitystrategy.ca/>
Using WordPress CMS plugin
- Walk BC
<http://www.walkbc.ca>
Using Drupal CMS
- Stay Active, Eat Healthy
<http://www.stayactiveeathealthy.ca/>
Using Drupal CMS

Further Information

- See Schedule A for Project Components
- See Schedule B for details of BCRPA main work areas

Related Projects

The following project is related to this one:

a) Document Management System

- The BCRPA is considering implementing a document management system which will include the capability to scan documents from a photocopier and link these contacts in the database.

Project Timelines

Every effort should be made to adhere to the launch date but otherwise dates are flexible according to consultant's recommendations:

Distribute RFP	March 10 th , 2009
Proposal Submission Deadline	March 27 th , 2009
Evaluate Submissions	April 3 rd , 2009
Consultant Interviews	April 10 th , 2009
Initiate Project	April 14 th , 2009
Complete Phase One	May 31 st , 2009
Phase Two Coding	June 1 st , 2009
System Testing	July 15 th , 2009
User Testing/Parallel Running	August 1 st , 2009
Launch Date	September 4 th , 2009

Selection Process

BCRPA will take into account such matters it considers appropriate in selecting the successful consultant. Evaluation criteria will include:

The consultants understanding of the assignment	20%
The proposed methodology	35%
The experience and qualifications of the consultants	25%
Fees and disbursements	10%
References (provide a minimum of three references)	10%

Proposal

The BCRPA requests that consulting firms interested in submitting proposals:

- Clearly outline the methodology and approach to the work
- Include a schedule of fees, with hourly rates, level of effort and total cost. Costs should be broken down between Phase 1, 2, staff training and potential ongoing support contract.
- Specify the principals and staff to be involved in the project, along with their general qualifications, and a summary of their experience.
- Submit a copy of the proposal in PDF format as well as hard copy.

General

The consultants should be aware of the following:

- The proposal should confirm that neither the consultant nor any member of the consulting team would be in conflict of interest with respect to the project if the consultant were selected to perform the services required.
- All proposals will become the property of the BC Recreation and Parks Association and, as such, are subject to the Freedom of Information and Protection of Privacy Legislation. To request documentation confidentially, bidders must submit a covering letter with their Proposal, detailing specifics of their request.
- The lowest quote of any proposal will not necessarily be accepted. The Association reserves the right to award the contract, negotiate the specific terms of the contract, and make other adjustments as required in consultation with the successful bidder.
- PDF versions of the proposals can be sent by email at srowe@bcrpa.bc.ca. Paper copies should be sent in a sealed envelope marked "Request for Proposal, BCRPA Membership Database", with the consultant's name and address shown on the upper left hand corner of the envelope will be received by the BCRPA at 101 - 4664 Lougheed Highway, Burnaby, BC V5C 5T5 up to 12 noon on March 27th, 2009.

Fax proposals will not be accepted.

Additional Information

If you have any questions regarding this RFP, please e-mail Steven Rowe, Information Systems Coordinator, BC Recreation and Park Association, no later than March 25th, 2009. E-mail address srowe@bcrpa.bc.ca

Schedule A

Project Components

There are two phases in this project. Phase 1 is to conduct a business analysis on current databases against the future needs of the organization. Phase 2 is to design, build, test, and implement the software to meet the needs of the organization; this phase also includes user training.

Phase 1

Business analysis phase

- 1) Analysis of current systems
- 2) Consolidate and clean up Access databases into one contact driven database assigning categories according to relationship with BCRPA
- 3) Expand database to include systems not currently included based upon analysis of future business needs
- 4) Produce recommendations on software/hardware required to run new system
- 5) Produce and agree a project plan for design and rollout of system

Phase 2

Design, build, test and implement software to manage:

a) CRM

A Contact Relationship Management system to manage and track communications with all clients of the organization.

Ability to:

- i. Store contact information specific to each project including addresses, phone numbers, web sites, emails.
- ii. Contact levels of lead, potential, existing, inactive and closed
- iii. Assign project categories, see b) below
- iv. Store electronic files against the contact
- v. Link other elements of the database to the contact such as Awards received or nominated for, exam results, grants applied for, help desk calls logged, job requested, financial transactions

b) Projects: Assigning, tracking projects and sub-projects

Management of BCRPA project or campaigns and ability to link these to contacts to define their areas of interest

Ability to:

- i. Store basic information about a project/campaign such as its name, owner, type, start and end date.
- ii. Store ongoing information about the project including tasks, events, documents and linked contacts.

c) Security Permissions

Ability to set user permissions on database/website to allow access to certain information according to relationship of the stakeholder with BCRPA. For example, different member only levels, non-members, and BCRPA staff. Setting project categories would give permission to stakeholders to access certain areas of information.

Additional security features to allow users to reset their own passwords, lockout users after three login attempts, log out after 15 minutes of inactivity and prompting for password changes every 6 months.

For data protection issues prompt users to confirm their details every 6 (address, phone number etc).

d) Inventory, Shopping Cart and Merchant Account

BCRPA products consist of exams, fitness registration, events, memberships, publications, advertising sales and promotional merchandise. The products have member and non-member prices. Promotional merchandise is generally not for sale but should be included within this section.

Ability to:

- i. Store information on products
- ii. Ordering information, record of items ordered against contact
- iii. Produce invoices and necessary documentation for client for financial transactions
- iv. Financial information; summary of accounts by contact, time period and type of product; ability to export into csv format.
- v. Link to all other modules that require a financial transaction e.g. booking events
- vi. Creation of a Merchant Account to take care of all financial transactions

NB: Events and memberships are not stored as products but should be included in the process to access the Merchant Account

e) **Awards**

Management of various BCRPA Awards including receiving nominations via an online form, storing them in a database, analyzing submissions and publishing results through the website.

f) **Project/Team Areas**

Due to the nature of work at BCRPA, some projects are short term and some are longer term. Projects and sub-projects need their own specific work area and functionality targeted to those stakeholders who have that relationship with the organization.

It is envisaged that part of this database will be available to authorized parties to interact with BCRPA i.e. updating contact details, submission of reports.

Details of main BCRPA Project/Team Areas are described in Schedule B.

g) **Exams**

Make recommendations and if agreed, implement a system to facilitate online examinations as part of the Fitness Accreditation process, see more about Fitness process in Appendix A.

Examinations are registered and paid for prior to taking them when clients visit the BCRPA offices and facilitated away from the office. Examinations are part written, part multiple choice, they are also closed-book. Students are able to evaluate their instructor and we should have the ability to enter these online. If the evaluation has not been completed give the ability to the student to complete them online following an email alert and a hyperlink to the appropriate place on the BCRPA website.

h) **Grants**

Manage the grants awarded by BCRPA. Grants are issued to an existing contact of the organization plus other organizations endorsed by it.

Ability to:

- i. Record information about grant applications
- ii. Complete grant applications online
- iii. Grants reviewing by third parties.
- iv. Upload grant-related documents and photographs
- v. Publicize those who have been awarded grants on the website, along with an archive of past recipients
- vi. Manage grant giving process
- vii. Evaluation submission and management.
- viii. Link an organization to BCRPA stakeholder who endorses them for a grant.

- ix. Grants are linked to Success Stories on the website and information obtained from the evaluation process and graphics submitted could be made live direct from this section.
- x. When viewing the main contact/organization record a link to the grant record is required

i) **Events**

BCRPA holds numerous events during the year such as conferences, workshops, and training courses. On occasion, we also publicize events organized by other bodies. These need to be created, managed, paid for online, provided with a viewable delegate list, etc.

Ability to:

- i. Set up conferences, workshops and training courses with different structures such as multiple sessions, locations with Google maps, special requirements
- ii. Promotion of event on an online calendar
- iii. Delegates to be able to sign up and pay online, but also to cancel and manage their booking.
- iv. Manage different payment rates such as early-bird specials, members and non-members
- v. Register on courses and sessions
- vi. Accept and manage submissions from speakers
- vii. Submit and manage handouts for events/sessions
- viii. Manage event programs; BCRPA staff uploading documentation and attendee ability to view and download these upon payment of event.
- ix. Gain feedback from events through online evaluation form
- x. Approval mechanisms for each stage of event booking by BCRPA staff
- xi. Record information on dietary requirements at event

j) **Case Management System**

In order to answer members' common questions, set up a searchable wiki or FAQ. Set up a Case Management System to manage questions submitted by members and stakeholders.

Ability to:

- i. Search an online Wiki or FAQ Knowledge Base to outline answers to common questions asked by members and stakeholders
- ii. Online form available in the logged-in area of the website, members and stakeholders can complete this when they have a question, results of the form is entered into a database against their contact record.
- iii. Manage questions received by members i.e. answer via email, write a note against a question, record a date/time answered, copy the question and answer to the knowledge base, change status of questions to active/closed/resolved/diverted.

k) **Newsletters**

Facility to compose and manage email and newsletter campaigns.

Ability to:

- i. Design numerous templates for standard periodic newsletter campaigns
- ii. Complete html campaigns including text, hyperlinks and graphics
- iii. Target campaigns to a group of stakeholders derived from either a search or created group in contacts and/or project/category areas
- iv. Manage newsletters with information on details of contacts sent to, bounces, read, opened, forwarded, unsubscribed, and out-of-office.
- v. Placement of newsletters on various parts of the website including newsletter page and archive section
- vi. Recipient ability to forward and unsubscribe

l) **System Emails**

Generate system messages to either confirm an action or remind that an action needs to be taken.

For example, when a new member joins, confirming purchases, event booking confirmations, job listing approved password reminder, and website recommendation.

We should:

1. Have the ability to amend the text within a system message
2. Review messages that have bounced

m) **Jobs**

Manage job submissions for placement on the website.

Ability to:

- i. Users to be able to submit their job online using an online form
- ii. Data to be stored in a database
- iii. Approve or deny job listing
- iv. Expire facility to automatically delete and archive a job from the website
- v. Move jobs from and archive to be made live again
- vi. Look into job description electronic file submission (submission of an attached word or PDF document)
- vii. Search jobs

- viii. Investigate the possibility for users to sign up to job alerts by email, unsubscribe if necessary.

n) Resource and Hyperlink Management

Facility to manage numerous bookmarks and resources on various parts of our website.

For Example:

- i. Fitness Workshop Listings including Location, Date, Workshop Title, Contact, Telephone, Credit Value, Website
- ii. Hyperlinks including URL, Details of Links

o) Reports

Ability to pull off pre-defined user-friendly reports from the system based upon multiple criteria.

System should have the ability, although not immediately required, to be data mined using tools such as Business Objects.

p) Advertising Sales

Organizations can submit advertisements to appear within BCRPA;s magazines (*Recreation & Parks BC* and *FitLife BC*), there should be an online facility to support this function.

Ability to:

- i. Complete an online form
- ii. Submit any related artwork
- iii. Pay for advert online

q) Content Management System

A CMS to manage all website functionality that links seamlessly to the other core modules of the database. The CMS should be able to manage a multiple website scenario.

A CMS would have features such as management of CSS, templates, hard coding, library of electronic media, user permissions for content authors, search engine optimization, analytics, site map, broken link checker, form builder, shopping cart and eCommerce solution, blogs and RSS features, photo gallery, surveying, and social networking.

Schedule B

Following is a list of main work areas within BCRPA. As part of these ongoing activities there are numerous sub-projects related to them. These sub-projects can be ongoing and have various time limits set against them.

a) Membership

Management of annual membership applications. This process for reminding and processing application should be automated online.

- i. Membership fees are dependent on type of member, there are 7 different categories
- ii. If the member is a student we would like to record the school and program they are enrolled in
- iii. We would like to record the members' areas of interest i.e. Active Communities, Fitness, Parks etc.
- iv. Our membership period runs from January 1st through December 31st and if someone joins in the middle of the year the fee is calculated as follows:
 1. If they join prior to the half way period they pay the full fee
 2. If they join after the half way period they pay 50% of the fee
- v. A system would need to manage the membership process automatically
- vi. An online profile should be created for each user so they may update their details online

b) Active Communities

Cross-sectoral initiative focused on supporting communities efforts to increase the physical activity levels of British Columbians.

Management of contact with these communities as follows:

- i. Main Active Community contact details
- ii. Type (Municipality, First Nation, Educational Institute, Organization, Other)
- iii. Team Leader contact details
- iv. Team Member contact details (currently on Name, Phone, Email)
- v. List of programs (Date, Type, Target Audience, Notes)
- vi. Subsidy Details – commissioning of surveys for which BCRPA assists financially (Type, Details, Date Applied, Amount Sent)
- vii. Report (Status Report, Community Plan)
- viii. Evaluation (Date, Type, Notes)
- ix. Notes (Record of significant contact with the Active Community)

c) Fitness

BCRPA is the regulatory body for fitness leadership in the province by collaboratively developing, recognizing and promoting national standards for the training and registration of Fitness Leaders

(fitness professionals).

Management of the registration includes contact with, registration, examinations, workshops etc., as follows:

- i. Fitness Leader contact details
- ii. Business details and contact information
- iii. Registration information (Entry/Start/Expiry Date, Payment and receipt processing, Renewal processing etc)
- iv. Management of each stage of their registration, certification and dates (for example, date when they became a Trainer of Fitness Leaders and printing/sending of certificate (certificates could be made available online to download)
- v. Hold – details of when a contact is on hold pending the receipt of information
- vi. Details of courses taken
- vii. Details of Volunteering activities
- viii. Management of workshops
- ix. Notes (Record of significant contact with the Fitness person)

Fitness Leaders must renew every two years for which an automated process will be required in the database.

Fitness Leaders go through a series of workshops to build up the necessary credit to be accredited with BCRPA. These workshops are approved by BCRPA and advertised accordingly. An online process should exist to assist with this, therefore an online form should be made available to submit name and details of the workshop along with the submission of related papers proving their skills to deliver them (resume, outline, handouts, manuals). If approved details of the course should appear on the website.

d) Parks and Recreation

Facilities

A detailed list of recreational facilities throughout British Columbia.

BCRPA partners should have the ability to log in to the system, create or amend existing details.

The data in these forms should form a series of reports which could be available to purchase online and downloaded in electronic format, preferably PDF.

e) Physical Activity Strategy and Walk BC

Committed to its goal to improve the health of British Columbians through leadership that enhances community action to promote physical activity.

Currently there is no database to web requirement for this project or their sub-projects. However, these projects will make use of the Contact Relationship Management system to record significant

contact with their stakeholders.

f) Healthy Food and Beverage Sales

This project encourages the sale of healthy food and beverage options in community recreation facilities and local government buildings through on-site vending machines, concessions, cafeterias and snack bars.

Currently there is no database to web requirement for this project or their sub-projects. However, these projects will make use of the Contact Relationship Management system to record significant contact with their stakeholders.